



State of California

Employment Training Panel

Arnold Schwarzenegger, Governor

April 17, 2009

Chad Hogan, Operations Director
Quotit Corporation
721 S. Parker, Suite 330
Orange, CA 92868

Dear Mr. Hogan:

RE: Final MONITORING VISIT REPORT for QUOTIT CORPORATION RETRAINING SB - ET08-0150

Date of the Visit:	1/08/09
Beginning/Ending Time:	3:30pm – 4:30pm
Date of Last Visit:	6/20/08
Visit Location:	Via Teleconference
Persons in attendance:	Chad Hogan, Operations Director, Quotit Corporation (Quotit); and Suzanne Godin, ETP Contract Specialist
Action Required:	No

CONTRACT INFORMATION:

Term of Agreement:	8/07/07 – 8/06/09	Agreement Amount:	\$39,000
Training Start Date:	8/07/07	No. to Retain:	25
Date Training must be Completed:	5/07/09	Range of Hours:	8-60
Type of Trainee:	SB Retrainee	Weighted Ave. Hours:	60

FINAL REPORT SUMMARY:

AGREEMENT HISTORY

This agreement was approved at the July 2007 Panel Meeting and was executed on 9/21/07. Training began on 8/07/07. ETP approved one amendment revision during the term of the agreement that extended the term ending date by 12 months. You reported that Quotit's last

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ETP (04/15/05)

date of training was 4/11/08 which allows for the 90-day retention period to be completed by the term ending date of the agreement of 8/06/09.

INTERVIEW WITH THE CONTRACT REPRESENTATIVE: GARY KRAUS

Quotit is a small business single employer providing design, development and production of custom software applications for the health insurance and employee benefits industry. Soon after Quotit's ETP Agreement was amended for an additional 12 months, talks began over a potential acquisition by a larger company. Your company moved to a new location and was subsequently acquired by a larger entity (Worden-Brown). Had you not been acquired, Quotit would have continued to train in order to maximize the ETP training dollars. As a result of the acquisition, you elected to close-out your ETP Agreement early.

You stated that the training that was delivered gave your employees the advanced software and continuous improvement skills needed to provide quality services to your clients, which you will continue to do under the umbrella of Worden-Brown.

DISCUSSION OF PROJECTED EARNINGS:

You provided Ms. Godin with projected statistics for the closeout of the Agreement. According to your records at the time of this final meeting, you expected to retain a total of 7 trainees (28% of planned retentions) who had completed the specified range of class/lab hours (8-60) and retention period. Quotit tracked 240 eligible hours on the ETP class/lab tracking system for the aforementioned 7 trainees. Therefore, Quotit is eligible to earn \$6,227 (16 percent of the encumbered amount) if all other agreement conditions are met. As of the date of this report, Quotit had received \$6,227, and the final contract closeout had been issued.

PROJECT STATUS PROVIDED BY THE CONTRACTOR:

Trainees Started Training:	19	Completed Training:	7
Trainees Enrolled:	19	Completed Retention:	7
Dropped Following Enrollment:	12	In Retention Period:	0
No. Completed Minimum Reimbursable Hours :	7		

TRAINING STATUS:

The statistical data submitted by you during this visit, as detailed above, agreed with the information contained on ETP's Trainee Status Report.

ATTENDANCE ROSTERS:

Ms. Godin reviewed of attendance rosters for the 5 trainees (appearing on Invoice #4 and #5 and compared them to the hours entered into the ETP on-line tracking system.

Attendance Rosters reviewed:	8/13/07-4/11/08	Rosters reviewed contained all the required information per Title 22, California Code of Regulations, Section 4442.	YES
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INVOICES:

Documentation reviewed was consistent with information reported on Invoices	4, 5,	Yes
Progress Payments	2	Yes
Final Payment		Yes

Ms. Godin assisted you in the submittal of Invoice #4 for Progress Payment 2 (Completion of Training) and Invoice #5 (Final Payment) for the five trainees.

AUDIT:

You will be notified in writing if this agreement is selected for an audit that will be conducted either at your site (field audit) or by telephone if selected for a desk audit (or "review"). These notifications will be sent in advance to allow ample preparation time and will include a list of documentation that will be examined by the auditor. A list of the documentation typically examined during an audit will be included along with the Audit Notification and Audit Confirmation letters. To provide support of training, original training attendance documentation is required; photocopied records are not acceptable.

Listed below are types of records typically requested during an ETP field audit:

- Training attendance records such as rosters, sign-in sheets, etc.
- Payroll records of individual trainees to verify wage and hours worked
- Personnel records regarding occupation and dates of employment
- Documentation of employer paid health benefits (if applicable)
- Cash receipts to verify receipt and accounting of ETP funds

RECORD RETENTION:

Records must be retained within your control and be available for review at your place of business within the State of California. This responsibility will terminate no sooner than four (4) years from the date of the termination of the Agreement or three (3) years from the date of the last payment by ETP to the Contractor, or the date of resolution of appeals, audits, claims, exceptions, or litigation, whichever is later.

If you have any questions or comments regarding this report, please contact Suzanne Godin at (619) 686-1918 or at sgodin@etp.ca.gov within ten (10) working days from the receipt date of this letter.

Sincerely,

A handwritten signature in black ink, appearing to read 'R. Swier', with a long horizontal stroke extending to the right.

Ryan Swier for
Diana Torres, Manager
San Diego Regional Office

A handwritten signature in black ink, appearing to read 'S. Godin', with a stylized, cursive script.

Suzanne Godin, Contract Analyst
San Diego Field Office

cc: Amber Luiz, Assistant Director
Kulbir Mayall, Fiscal Manager
Master File
Project File